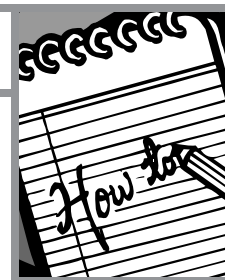


Appendix C: Sample Work Plan



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| Action Item | Tasks | Relevant Manual Chapter |
|---|--|-------------------------|
| Evaluate Current System, Conduct Cost Baseline, and Design Your RM Program | | |
| Identify current contractual obligations and terms | <ul style="list-style-type: none"> ■ Seek assistance from contract and procurement departments to identify the current contractors for waste and recycling related services, the length and terms of the services contracts, and whether you will incur any penalties for switching contractors | Chapter 2 |
| Evaluate existing waste/recycling system and cost | <ul style="list-style-type: none"> ■ Get all team members to characterize the current waste and recycling system (map material flows) ■ Baseline current service level, and waste and recycling levels ■ Finance department to provide information for estimation of total system cost (compare prices set out in contracts with actual bills for services; include internal management cost) | Chapter 3 |
| Identify potential cost savings and other benefits from diversion (note: this step is optional) | <ul style="list-style-type: none"> ■ Estimate the potential cost savings from increased diversion and recycling ■ Estimate the potential in reduction of greenhouse gas emission ■ Estimate reduction in energy use | Chapter 3 |
| Determine the scope of RM program | <ul style="list-style-type: none"> ■ Determine initial range of services/materials to be covered by contract | Chapter 4 |
| Develop a Request for Proposal (RFP) | | |
| Draft RFP | <ul style="list-style-type: none"> ■ Draft an RFP that includes program goals and services desired | |
| Review draft RFP | <ul style="list-style-type: none"> ■ Get all team members to review draft RFP—set a firm deadline for comments | Chapter 4 |
| Finalize RFP | <ul style="list-style-type: none"> ■ Receive and incorporate comments as appropriate | |
| Approval of RFP | <ul style="list-style-type: none"> ■ Upper management/legal department sign-off on RFP | |

Appendix C: Sample Work Plan

| Action Item | Tasks | Relevant Manual Chapter |
|--|--|-------------------------|
| Solicit Bids | | |
| Compile list of prospective providers | ■ Using local and other resources, such as trade associations (recycling, waste, environmental), compile list of potential providers | Chapter 5 |
| RFP release to prospective providers | ■ Release RFP to those interested bidders ■ Inform organization personnel that an RFP has been issued (give them this schedule) | |
| Pre-bid conference | ■ Conduct a pre-bid meeting to familiarize bidders with organization, nature of RM and goals, “rules of the game,” and facilities | |
| Deadline for submission of questions on RFP | ■ Allow bidders to submit questions on RFP | |
| Receive bidder questions | ■ Acknowledge receipt of each query and indicate when responses will be sent | |
| Send out summary of questions, comments and/or amendments of RFP to all candidates | ■ Compile list of all questions and answers and submit to all bidders | |
| Receive proposals | ■ Acknowledge receipt of each proposal | |
| Bid Review and Selection of Contractor | | |
| Develop evaluation criteria/ process | ■ Establish criteria by which the bids will be evaluated | Chapter 5 |
| Bid evaluation | ■ Have all team members separately rate each proposal according to the pre-determined scheme. Convene a meeting to achieve consensus or down select two to three bidders. | |
| Request further presentation for downselected bidders <i>(Optional and only if a clear selection has not yet been made)</i> | ■ Invite downselected bidders to give oral presentation | |
| Present recommendation to upper management | ■ Once a final bidder has been selected, develop presentation with key costs and benefits of the proposed RM program and an implementation plan ■ Make presentation and appoint negotiation team to enter into contract negotiation | |
| Approval and notification of the selected provider | ■ Notify the selected provider of the decision and all unsuccessful bidders | |

Appendix C: Sample Work Plan

| Action Item | Tasks | Relevant Manual Chapter |
|--|--|-------------------------|
| Contract Preparation and Negotiation | | |
| Draft RM contract based on RFP | ■ Draft RM contract based heavily on RFP and winning proposal, use legal department as resource where appropriate (e.g., for terms and conditions) | Chapter 6 |
| Review draft RM contract | ■ This task falls to the champion and legal department | |
| Negotiate RM contract, determine transition start date | ■ Might involve up to a to full day working session, depending on scope | |
| Finalize and sign contract | ■ Sign contract and celebrate your hard work! | |
| Contract Implementation | | |
| Begin implementation | ■ If there is a time lag, have periodic meetings between contract signing and start date to chart plans and resolve any outstanding issues (gets the partnership off on the right foot!) | Chapter 6 |